

Valuable Papers Inventory

FRM-00394

In this issue

- Description of a valuable papers inventory
- Valuable papers inventory form

Tips to help you

- Develop an inventory
- Maintain an inventory

What you'll need

- Inventory form included in this issue
- Valuable papers
- Pencil

A valuable papers inventory is a list of your valuable papers and information about them and your personal business affairs. For example, an inventory might include a list of insurance policies and information about the policies such as: company, policy number, policy amount, loans against the policy, beneficiaries and where the policy is kept.

Why develop and maintain an inventory?

In the event that you become ill and cannot handle your personal business affairs or upon your death, a valuable papers inventory can prevent confusion, delay and loss of money. An inventory should be developed so that someone else can understand it without explanation from you.

Each time you review it, a valuable papers inventory serves as a reminder to keep papers current.

Because an inventory includes the location of each paper listed, it is a handy guide for locating personal documents.

A valuable papers inventory summarizes important information for quick reference.

When the inventory is reviewed on a regular basis, it provides a means of measuring financial growth.

When should you develop and update a valuable papers inventory?

If you have never made an inventory of your valuable papers, now is the time to begin. Information should be kept current and adjustments made at the time of major changes such as births, deaths, retirements, purchase or sale of properties and securities. In addition, a date should be set aside for annual review of the contents of the inventory to make sure that all necessary changes have been made.

Where should you keep a valuable papers inventory?

Keep two copies of your inventory. File one copy in your permanent home file and one copy in your home safe or bank safe deposit box.

Who should develop and update the valuable papers inventory?

Usually the person keeping the family records develops and updates the inventory. However other family members should know where to locate the inventory and be familiar with the information in it.

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Valuable Papers Inventory

For _____ Date recorded or revised _____
Safe deposit box no. _____ at _____ Key kept at _____

Family Social Security Numbers

[illegible]

Names of Advisers

(Accountant, Insurance Representative, Lawyer, etc.)

[illegible]

Insurance Policies

[illegible]

Financial Accounts

Type	Company/institution	Address	Account/Card#	Phone #
Checking account(s)				
Saving account(s)				
Credit card account(s)				

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Financial Papers

Type of security	Company	Where stored
Stocks & Bonds		
Mutual Funds		
Trusts, Annuities		
Retirement Plans		

(Attach list of securities and bond numbers)

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Real Estate (Include Cemetery Plots)

Type	Location and/or description	Purchase date	Purchase price	Mortgage amount and holder	Where record is kept

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Vehicles

Make	Model and year	Engine# or serial#	Purchase price	In whose name	Lien holder	Amount of loan	Where papers are kept

Debts

Item or description	Company or person owed & address	Amount	Purchase date	Payment plan	Final payment due	Where records are kept
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Payments Due Us

Item or description	Company or person owed & address	Amount	Purchase date	Payment plan	Final payment due	Where records are kept
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Other Valuable Papers

Type of paper	Where kept	Type of paper	Where kept
Adoption papers	_____	Income & expense records	_____
Baptismal records	_____	Income tax records	_____
Birth certificate	_____	Marriage certificate	_____
Citizenship papers	_____	Military records	_____
Death certificate	_____	Networth statement	_____
Divorce papers	_____	Passport papers	_____
Educational records	_____	Patents, copyrights	_____
Employment records	_____	Safe deposit box inventory	_____
Family history & photos	_____	Will	_____
Health records	_____	_____	_____
Household inventory	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

About the series

This is a series of fact sheets to assist you in setting up a system to help you get control of your time and resources.

Each fact sheet gives you suggestions and ideas concerning one topic with a suggested activity to help you get one step closer to becoming organized.

It may take you as long as a year to get your management system working effectively for you.

Households that develop such a system and use it faithfully have discovered that no matter what the economic conditions are, they can still get ahead or at least stay even.

In this series, you can request fact sheets on the following topics:

- *Organizing Your Home Business Center* (FRM-00390)
- *The Temporary Home Filing System* (FRM-00391)
- *The Permanent Home Filing System* (FRM-00392)

- *Valuable Papers Checklist* (FRM-00393)
- *Valuable Papers Inventory* (FRM-00394)
- *Taking A Household Inventory With a Camera* (FRM-00395)
- *Keeping Home Records: What to Discard* (FRM-00396)
- *Replacing Valuable Papers* (FRM-00397)